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Making Performance Evaluations Relevant

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The Dreaded Performance Evaluation

[Performance Evaluation](#)

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How Do Employees Feel About Performance Evaluations?

- Bureaucratic exercise forced upon us by HR
 - Pointless
 - Waste of time
 - Unnecessary
- No-one uses the data
 - Just an exercise to fill in the forms
 - We just need to meet the deadlines
- Fear
 - Employees are often terrified of walking into their review

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How Do Managers Feel About Performance Evaluations?

- Waste of time
- Inability to give merit increases—what's the point?
- Not sure how to measure performance
 - Lack of consistency
 - Lack of uniformity of rating/measurements
- Apprehension regarding employee's response
- Lack of clarity regarding the best tools
 - Self evaluation
 - Multiple evaluation forms
 - Multiple evaluation content samples
 - Job descriptions
 - Competency-based
 - Goal/objective based

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Benefits of Performance Evaluations

- Objective: Inspire people to do their best work
 - Ability to provide feedback (positive and constructive)
 - Fosters a learning environment
 - Creates a culture of performance and accountability
 - Ability to set clear expectations
 - Identifies what's working (build confidence)/not working (development)
 - Discuss goals and development
- Increase employee morale and engagement
- Reduce risk for frivolous legal actions
 - Companies run "lean" = higher expectations/standards
 - 2016: 6% increase in retaliation-based charges with EEOC (65% "no reasonable cause")

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The Evaluation Process

Step 1. Prepare, prepare, prepare

- Employee self-evaluation (ensure same page)
 - This should not be the evaluation!
- What are the key messages you want to convey?
- What is the overall feeling you'd like the employee to leave the meeting with?

Step 2. Logistics for discussion

- Maintain confidentiality
- Put the employee at ease

Step 3. Open with an agenda (help employee relax)

- E.g., During our performance evaluation today, we will look at four key areas: 1) your past performance, 2) your current performance, 3) 2016 goals and objectives, and 4) your personal development plan. We will discuss what you accomplished during 2016 as well as talk about things that didn't go as well as you'd hope. I'd also like to have an open dialog about the future by looking at your 2017 goals and objectives and the key areas on which you'd like to focus for personal development...

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The Evaluation Process

- Identify major areas of responsibility and specific objectives that should have been accomplished
 - Performance standards (job descriptions)
 - Competencies
 - Goals/objectives
- Identify how you measured the areas and objectives
- Identify performance factors also considered (e.g., motivation, etc.)
- Discuss development
- Establish frequency of go-forward feedback meetings
- Make notes, as needed, regarding action items and agreed upon items
- Sign, allow employee to make comments, distribute copies

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Tips

- No surprises
 - Not corrective documentation
- Do not create “halo” or “horns” effect
- Encourage candid discussion
 - Should never be a one-way discussion
 - It should be a dialog
 - E.g., What do they believe they did well? What didn't happen the way they'd hoped? If they could do it differently, what would they do? What support do they need?
 - Self-evaluation
- Give praise and credit where it is due
 - Don't miss this opportunity to praise exceptional employees – or you may lose them to the competition
- Don't shy away from dealing with issues
 - Also important to reinforce plans for getting an employee back on track when there have been issues.
- Don't close the evaluation until you are both on the same page

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Tools

- Self-evaluations, can be useful tool
 - Employee independently assess performance
 - Employee's objective reflections
 - Used as a gauge (ensure same page)
 - Should not be the review
- Evaluation Forms
 - Competencies & objectives/goals
 - Job Description
 - It is not about the forms – its about the process

Evaluation Details

- For exempt and non-union, non-exempt (OEE)
- Performance evaluations must be reviewed and initialed by your Executive Committee member
- Due to HR on July 31, 2017

Supervisor Training

- Training sessions
 - Topics
- Supervisor roundtables

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Questions??

Thank you!!!